

SOP#: ADCR-14

**Authorization of Outside Medical Services (AOMS) for
Research Participants**

Version #: 1.2

Next Review Date: 07/2022

Approved Date: 09/2021

Review Interval Period: Biennial

NCI Clinical Director Signature:

POLICY

If research procedures/required medical services cannot be conducted at the NIH Clinical Center and are available at an outside facility, these research procedures/medical services may be paid by the NCI Center for Cancer Research. Approval of payment must be secured prior to the services being rendered to the participant.

PURPOSE

To provide detailed instructions for the submission, approval, and payment process of NCI Center for Cancer Research (CCR) Authorization of Outside Medical Services.

For ambulance, air transportation, autopsy and funeral expenses, there is a separate process and form *Authorization for Payment for Medical Services Outside the Clinical Center* (NIH Clinical Center Form 2541). This can be found on the NIH Clinical Center Intranet, Health Information Management Department, Forms [website](#).

RESOURCES

Center for Cancer Research (CCR) Office of Research Nursing (ORN) Department Forms [website](#).

- *Authorization for Payment of Outside Medical Services (AOMS) Request Form*

PROCEDURES

STEP 1: Initiate the Process for Authorization of Outside Medical Services (AOMS) Requests

- Clinical staff (Research Nurse Coordinator, Patient Care Coordinator and/or MD/PA/NP) initiate the process by completing and submitting the required form to the Office of the Clinical Director (OCD), NCI, CCR.
 - To use the most recent version of the CCR form, download and complete from the website referenced above under *Resources*. Once accessed from the website and downloaded the form can be completed electronically.

- The required form must be completed, submitted and notification of Purchase Order Tracking System (POTS) order approval received PRIOR to the procedure/test being performed. It is permissible for the cost of the procedure/test to be an estimate if the service is less than \$10,000.
 - The form must be sent via encrypted email to NCICCROutsideMedServ@mail.nih.gov
Subject Line: AOMS Request
- **For services over \$10,000:** additional approval is required by the NCI Clinical Director. The process is the same as detailed; additional information and approvals will be acquired by OCD administrative staff at the time of submission.
- **For EMERGENCY orders:** Emergency orders must include “Emergency” in the subject line with detailed information in the body of the email with date needed. If payment is required for the SAME DAY, the notification must be sent before noon. Please note that same day payment is not ensured and will be dependent upon the availability of a purchasing agent.
- **For non-emergency orders:** An expected timeline for request submission and approval is 72 hours.

STEP 2: Enter Order into the Purchase Order Tracking System (POTS)

Upon submission of the form, OCD administrative staff monitor incoming email and enter the order into the Purchase Order Tracking System (POTS).

- OCD administrative staff upload a password protected copy of the CCR form to the POTS order and update the tracking spreadsheet in OCD OneNote.
- The justification in the POTS order must emphasize that the services will support CCR’s mission.
- Approval notification boxes should be selected on each POTS order: Order Completing, PA/CCH Modifies Order Total, Approval.
- If the request exceeds \$10,000, OCD administrative staff will coordinate with the clinical team for a Statement of Work and email notification/decision from the NCI Clinical Director, cc: Deputy Clinical Director.

STEP 3: Approval/Denial of Authorization

- The Deputy Clinical Director is the approving authority for the POTS order and will receive a notification that there is a new order to review in the system.
 - The Deputy Clinical Director will review the password protected order documentation and cross reference with the OCD OneNote tracking spreadsheet for additional information, if necessary.
 - If there are any questions associated with the order, the Deputy Clinical Director will reach out to OCD administrative staff/requestor on the clinical team.
 - Upon approval/denial of the order, a notification will be sent in POTS to the OCD administrative staff.

- If the order is denied, the Deputy Clinical Director will provide notification via email to the requestor with cc to OCD administrative staff.
- OCD administrative staff provides an email notification to the requestor with the POTS order number and confirmation that the order has been approved/denied by the Deputy Clinical Director.
 - OCD administrative staff obtains Deputy Clinical Director signature, adds corresponding POTS order number and uploads a password protected copy of the signed CCR form to the POTS order.

STEP 4: Participant Receives Services

Once approval notification has been received by the clinical team, services may be rendered to the research participant.

STEP 5: Payment for Services

- When the participant receives the final invoice from the vendor and provides to the team, the invoice is sent via encrypted email to NCICCROutsideMedServ@mail.nih.gov with the POTS order number in the subject line.
 - OCD administrative staff will add the invoice as receiving to the corresponding POTS order and forward the encrypted invoice to the assigned purchasing agent in order to finalize payment.

Note: Payment for the service will be paid to the vendor not to the participant.

 - Email is the preferred method; however, invoices may be mailed to:
CCR Office of the Clinical Director
10 Center Drive, Suite 3-2571
Bethesda, MD 20892

Note: Payment may be delayed if invoice is mailed.
- Office of the Clinical Director Point of Contact: [Aubrey Wachter](#)